

**Phoenix Program
Process Definition – Purchasing Module**

Process	<i>Request For Quote - Agency not using PeopleSoft</i>
Process Number	<i>PO – 016</i> Previously Revised 4/8/99 Latest Revision 4/20/99

Description of Process

This process is used by State Purchasing to bid a requisition from an agency not using PeopleSoft

Input to Process

State Requisition (Hard Copy)

Output of Process

RFQ Report for Non-PeopleSoft Agencies

Service Level Agreement Required? (if yes, provide a brief description)

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PeopleSoft Panel Groups being Used

Function	Panel Group
RFQ Creation	Request Quote
Vendor Selection	Vendor Association by NIGP
Dispatch RFQ's to Vendors	RFQ Form
Enter Vendor Responses	Enter Responses
Enter RFQ award data	Award Quote (Analysis & Awards panel only)
Print Award Summary Report	Award Quote

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Business Process Description

Process Description	Responsibility (Agency/Centralized)
Step 1: Agency procurement officer prepares State Requisition and forwards to State Purchasing.	Agency Procurement Officer
Step 2: Requisitions are received by State Purchasing, logged in, and forwarded to the appropriate buyer for processing. The buyer may forward to support personnel for entry into system.	State Purchasing Administrative Support Personnel
Step 3: Navigates to Manage Request for Quotes Menu (Go, Administer Procurement , Manage Request for Quotes)	State Buyer or Support Personnel
Step 4: Navigates to the RFQ Header panel (Use, Request Quote, Header, Add). Selects Business Unit 99999 and clicks the OK button. This will display the Header panel.	"
Step 5: Enters the agency requisition number in the "Reference" field, selects the appropriate buyer, and enters the bid opening date and time. Coordinates bid date and time selection with the bid room. Buyer also selects the appropriate location associated with the return address for the RFQ (PO_001001). The defaulted Billing Address should be left alone. If the RFQ is for an RFP, the "RFP" checkbox should be selected. Based on the hard copy of the requisition, Shipping and Billing address information should be entered in the "Comment" field. (Be sure to check the "Send to Vendor" flag)	"
Step 6: Go to the "Line" panel tab and key data from requisition as follows: Line description is entered in the field to the right of the Item ID. If the description exceeds 30 characters, the remainder of the description should be entered in the "Comment" field at the bottom of the panel (Be sure to check "Send to Vendor"). Select the appropriate "Category" (5 digit NIGP) and UOM. Key the line quantity. The Ship To location should always be PO_999999.	"
Step 7: Go to the "Activity" panel tab, verify an activity date of 01/01/1902 and enter a bid description into the "comments" field. This description will be posted to the Internet and should be keyed such that the "key" word of the description is the first word since vendors will use an alpha search on this field. If the estimated value of the RFQ is less than \$10,000 it is optional to post the bid description to the Internet. If posting to the Internet is not desired, uncheck the "POST" checkbox. It is legally required that all bids with estimated values of \$10,000 or more be posted to the Bid Registry on the Internet.	"
Step 8: After completing entry of all data, returns to the "Header" panel tab, changes status to "Approved", and saves panel.	State Buyer
Step 9: Navigates to "Vendor by NIGP" panel. (Use, Vendor Selection by NIGP, Vendor by NIGP, Update/Display) Key RFQ number and press enter.	"

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<p>Step 10: Use top scroll bar on the panel to select the NIGP code by which to produce a list of vendors. Click on the flashlight to display a list of vendors in the bottom scroll bar. Select the vendors by clicking the checkbox to the left of each vendor. These vendors will be displayed in the middle scroll area.</p> <p>NOTE: You can go back to the top scroll, select another NIGP code, click the flashlight again, and then select additional vendors.</p>	“
<p>Step 11: Go to the “Vendor List” panel. The selected vendors will be displayed. Additional vendors can be added by inserting new rows (F& or Insert icon) and keying in the appropriate vendor number. Vendors can be deleted by placing the cursor in the Vendor ID field and using the delete icon or F8.</p> <p>NOTE: Control F4 can be used to search by vendor short name.</p>	“
<p>Step 12: Click the magnifying glass by each vendor to display their first address. Use the drop down arrow to display a list of additional addresses. Select the appropriate address for each vendor. Save the panel.</p>	“
<p>Step 13: Dispatch quote forms to vendors. Navigate to “RFQ Form” (Report, RFQ Form, Update/Display). Enter Business Unit and RFQ ID and run process to Print RFQ's.</p>	“
<p>Step 14: Mail RFQ forms to vendors. Make one copy of RFQ form to maintain with purchasing file. Forward file to Bid Room.</p>	Buyer or Support Personnel
<p>Bids are returned to the bid room prior to the bid opening date. On the bid opening date they are opened and read. The bid forms are then placed in the file and forwarded to the buyer.</p>	
<p>Step 15: Buyer reviews bids and enters prices into the system. Navigates to “Enter Responses” panel (Use, Enter Responses, Header). Selects any vendors who responded to the bid invitation and enters the vendor's payment terms and updates the Response Type.</p>	“
<p>Step 16: Goes to the “Line” panel, checks “Vendor Responded” for each line bid, and enters prices and lead times for each line.</p>	“
<p>Step 17: Navigates to the Analysis and Awards Panel. (Use, Award Quote, Analysis and Awards) Buyer reviews vendor pricing and determines which vendor will receive the award for each line, and enters quantities to be awarded for each line. DO NOT CONTINUE TO THE “CREATE PO” PANEL IF NON-PEOPLESOFT AGENCY.</p>	“
<p>Step 18: After all award data has been entered, selects the “RFQ Award Data for External Customers” report from the Report Menu and runs the report. This report lists the items, prices, and vendors to be awarded.</p>	Buyer
<p>Step 19: Keeps one copy of report to file and forwards report to Agency Procurement Officer.</p>	“

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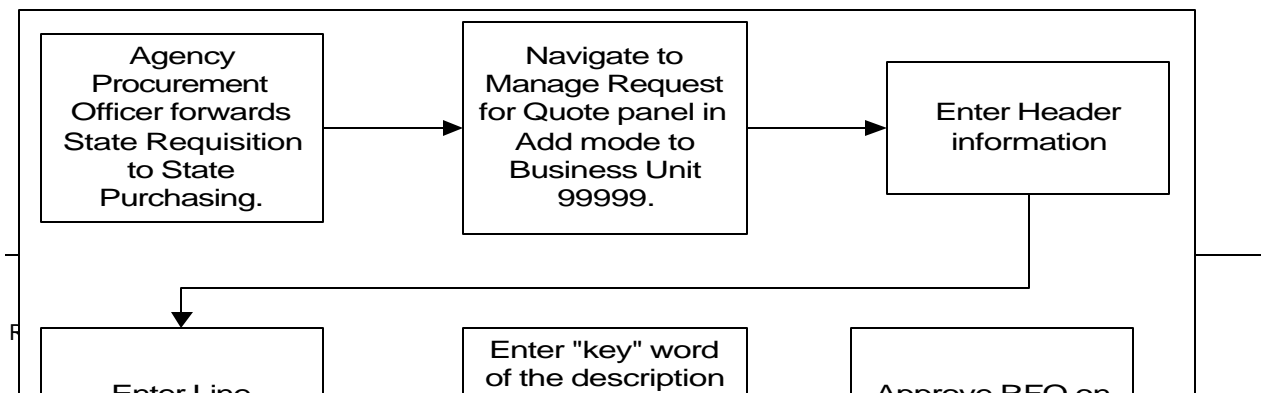
Step 20: Receives report and issues FPO(s) for the items, prices, and vendors indicated, attaching the report to their copy of the FPO as documentation that the bid process was performed at State Purchasing.

Agency Procurement Officer

Forms Used with Process (#)

**Attach sample form(s)

Process Flow Diagram (if appropriate):



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Process Signoff

Tested By
Date Tested